

HelloSign

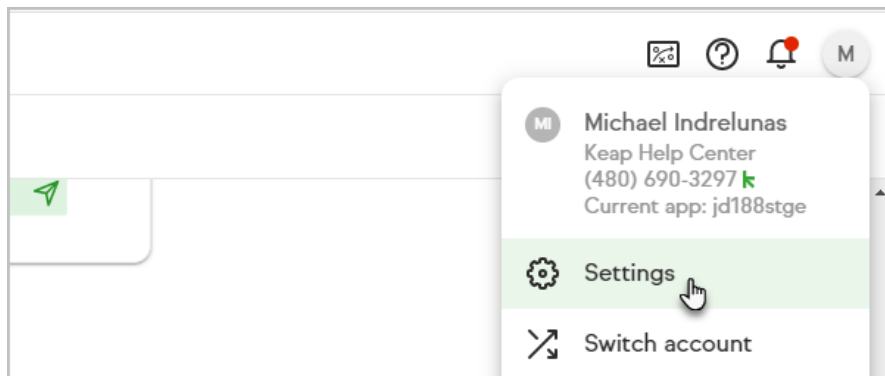
This article applies to:

Connect Keap with HelloSign to automate sending documents with legally binding electronic signatures and trigger automation when a document is signed.

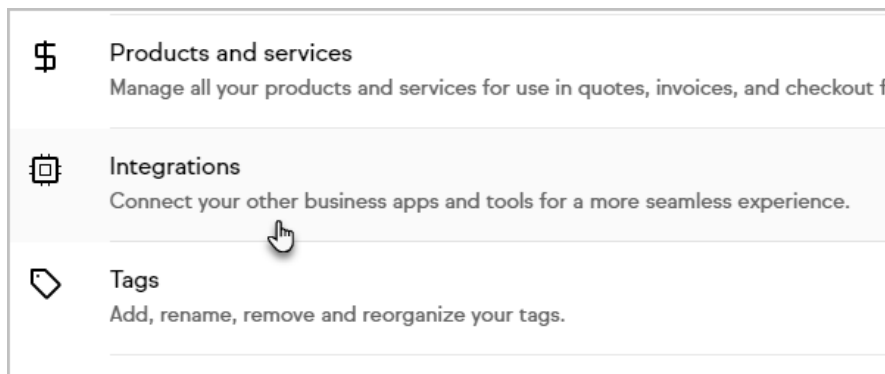
Connect HelloSign

Note: A Standard or Premium HelloSign plan is required to use this integration

1. Navigate to **Settings**



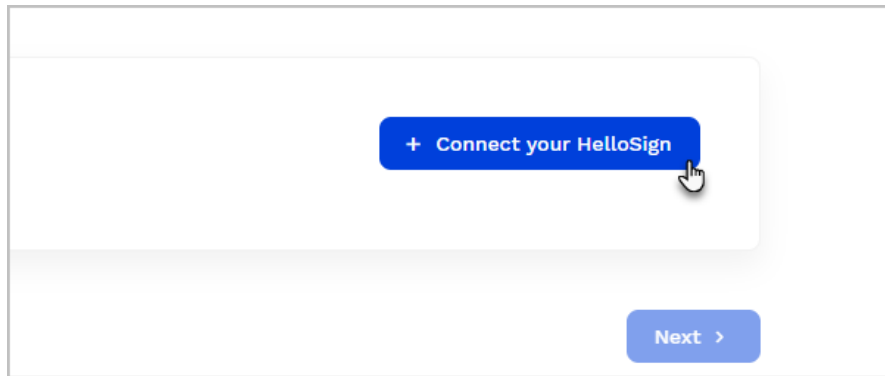
2. Click **Integrations**



3. Click **Connect** on the HelloSign card



4. Click **Connect your HelloSign**

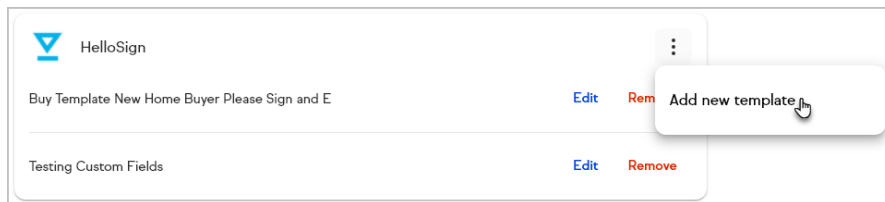


5. Login to your HelloSign account
6. Click **Accept** to allow Keap to access your HelloSign account
7. Click **OK**
8. Click **Next** to continue and create a template

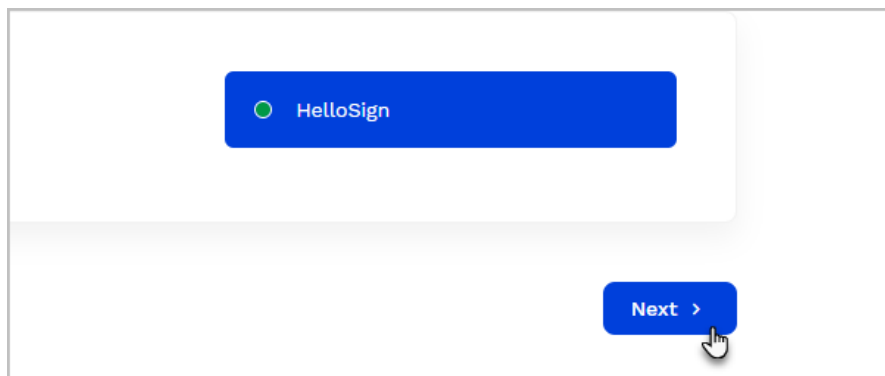
Add a HelloSign template to Keap

Before adding a new template, ensure you have created the document in HelloSign first.

1. Open the menu on the HelloSign card and click **Add new template**



2. Click Next

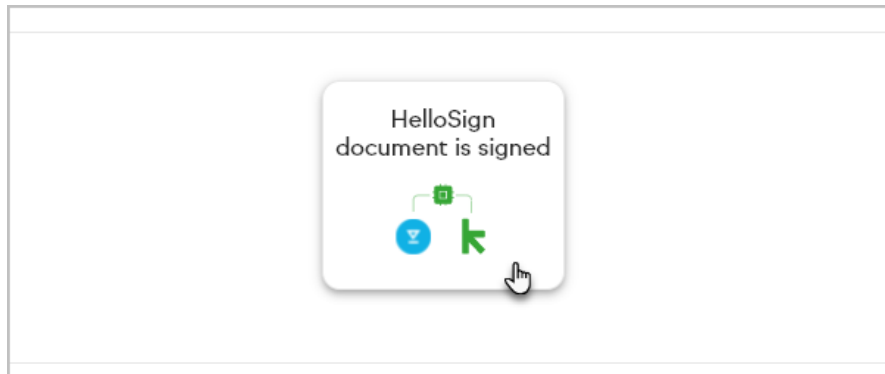


3. Select the HelloSign template to configure
4. To map field entries from your HelloSign document onto Keap's contact record, select the HelloSign fields and their corresponding fields in Keap
5. Click **+Add additional mapping** to add additional fields
6. Click **Submit**

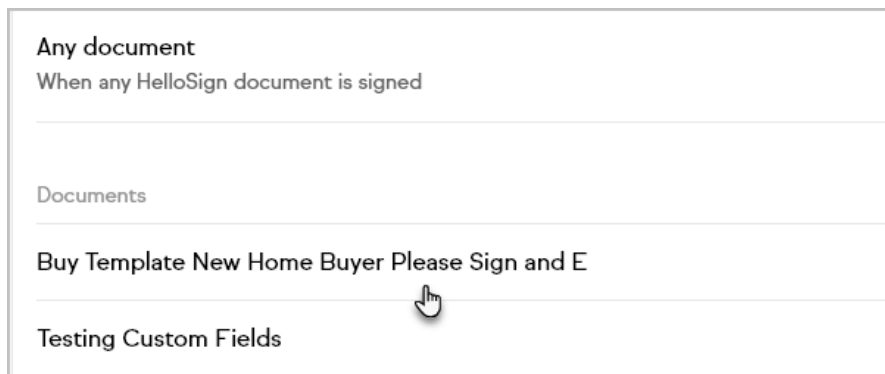
Start automation when a HelloSign document is signed

Follow up with contacts and initiate your internal processes when a HelloSign document is signed with Easy Automations.

1. Create an Easy Automation
2. Click **When**
3. Search for **HelloSign**
Or click **Show all options** and click **HelloSign document is signed**



4. Select which HelloSign documents should trigger your automation

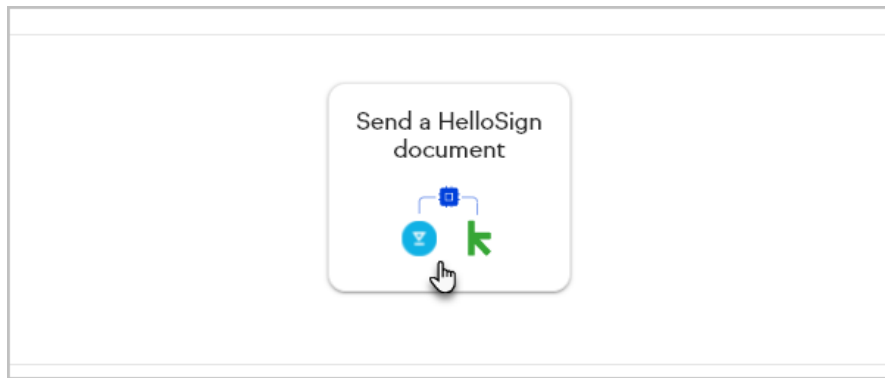


5. Click **Next**
6. Complete your automation with one or more Then actions and publish it

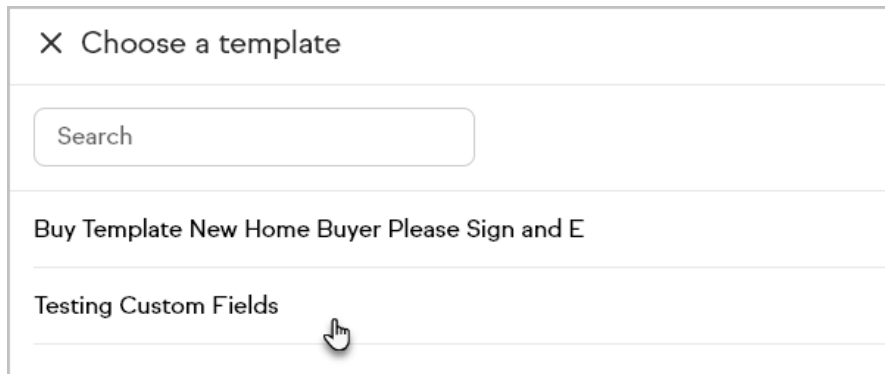
Automatically send a HelloSign document

Don't leave your clients waiting. Use Easy Automations to send a HelloSign document immediately.

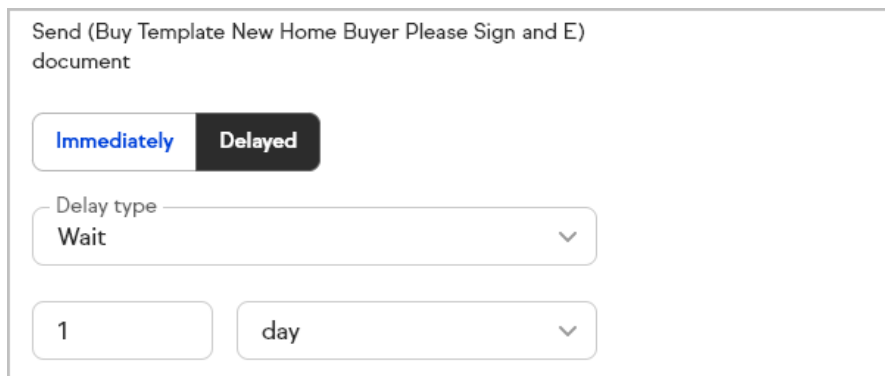
1. Create an Easy Automation and choose a **When** condition to start your automation
2. Click **Then**
3. Search for **HelloSign**
Or click **Show all options** and click **Send a HelloSign document**



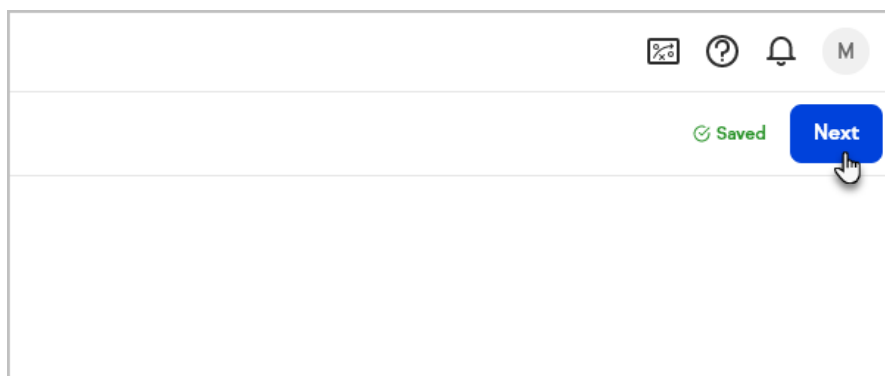
4. Select which HelloSign document should be sent



5. Select whether your document should be sent immediately or if it should be delayed



6. Click Next



7. Complete your automation with more Then actions as needed and publish it

FAQs

What type of HelloSign plan is required for this integration?

You need a Standard or Premium plan for our HelloSign integration. The HelloSign integration is not available for free trial and Essentials plans.

Why aren't the entries into my HelloSign document being added to my Keap contact records?

Your HelloSign template fields need to be assigned to the "Sender" in HelloSign. If the Sender role isn't selected, the information will not be saved to Keap. [Click here](#) for more information.

When I try to connect to HelloSign, why am I told I do not have the ability to connect to Keap?

You must have a [Standard](#) or Premium HelloSign account to use this integration.

I am having trouble accessing the HelloSign integration. Why can't I connect to my HelloSign account?

In order to successfully connect or update your HelloSign integration, ensure you are not using a private browser and that 3rd party cookies are not blocked in your browser settings.

Why is my template name not appearing in Keap?

If the HelloSign template name contains a "-", it may not save properly. You can remove the "-" character in HelloSign to ensure the template saves.

Why is the template name being cut off? And will it still work properly?

Yes, while our integration with HelloSign limits template names to 45 characters, your integration will still work as expected and the HelloSign recipient will see the full name of the template. The template name is only shortened in Keap.
